

File & Serve HTML5 Quick-Reference Guide

Release 3.14

Topics Covered in this Document

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Registration Options

Three registration options exist in Odyssey File & Serve.

Register for a New Firm Account

This account is perfect for the following users:

- Attorneys
- Firms with multiple filers
- Solo attorney practitioners

Before you register for a new firm account, please check with your firm to ensure that an account has not already been created. If a firm account has already been created, ask your Firm Administrator to invite you to join the firm.

Join a Firm

To join a firm, you must request an invitation from your Firm Administrator. You cannot join the firm by going to the regular registration page on the home page.

Register for an Individual Filer Account

This account is perfect for the following users:

- Pro se filers
- Process servers
- Landlords/tenants

Registering for Odyssey File & Serve

To register for File & Serve, perform the following steps:



1. From the home page, click .
2. Complete the required fields, which are outlined in red: **First Name**, **Last Name**, **Email Address**, **Password**, **Security Question**, and **Security Answer**.

Next

3. Click .
4. On the next page, select the appropriate registration option.

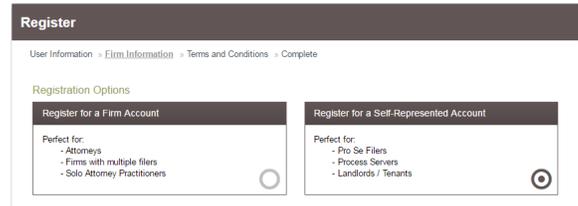


Figure 1.1 – Register Page

5. If you are registering for a new firm account, click the option for a firm account.

Note: If you want to join a firm, you cannot register to join a firm from the home page. Instead, you must request an invitation email from your Firm Administrator. After you receive the invitation email, click the link in the body of the email. You will be guided through the registration process including joining a firm.

6. If you are registering for an individual filer account, click the option for a self-represented account.

Keyboard Shortcuts

At any time while you are in the File & Serve system, you can use keyboard shortcuts for assistance. Press SHIFT+? to display the following window.

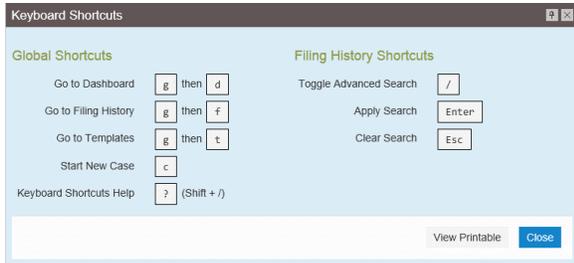


Figure 1.2 – Keyboard Shortcuts Window

Press any shortcut key to initiate an action depending on the key you pressed. The keyboard shortcuts are designed to make your experience flow more smoothly and to help you to gain efficiency in using the system.

Note: The tab key is not functional within the Safari application program.

Filing a New Case

Prior to filing a new case, you must set up a payment account.

Perform the following steps to file a new case:

1. Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **File Dashboard** under the **New Filing** header.

The *Start a New Case* page opens.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

Note: A red box around the field indicates that it is required.

- a. Select your court location in the first **Location** field.

Note: This is generally the county or district court where you will be doing the filing.

- b. Select the specific court in the **Refine Location** field.

Note: The location filtering feature is configured by Tyler and may not be available on your system.

Note: The selection in this field is limited to only the courts in the county or district that you previously selected.

- c. Select your category.

Note: This field is determined by the location you selected.

- d. Select your case type.

Note: This field is determined by the category you selected.

Note: The fee associated with the case type is displayed.

3. After completing the required fields, click

Save Changes

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope** to continue with your filing.

Entering Party Details

Each case requires a party type.

Perform the following steps to enter the details for the parties involved in the case:

1. In the **Party Information** section, enter the information for the first party on the case. If you are the party, select the **I am this party** check box. Or indicate whether the party is a business or agency by selecting the **Party is a Business/Agency** check box.

Figure 1.3 – Party Information Section

2. Complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields for the first party.
3. Select the country from the drop-down list.
4. For a party in the United States, complete the **Address**, **City**, **State**, **Zip Code**, **Phone Number**, and **Filer ID** fields.

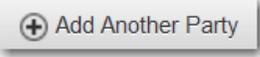
For a party in Mexico, complete the **Address**, **City**, **State**, **Postal Code**, **Phone Number**, and **Filer ID** fields.

For a party in Canada, complete the **Address**, **City**, **Province**, **Postal Code**, **Phone Number**, and **Filer ID** fields.

Note: Select the province from the **Province** drop-down list.

5. Select a lead attorney from the **Lead Attorney** drop-down list.

Note: If you select **Pro Se** from the **Lead Attorney** drop-down list, the system shows “Pro Se” as the lead attorney instead of the party’s actual name when viewing filing details.

6. If you want to add another party to the filing, click  , and then enter the party information for the second party.

Note: After all attorneys for both parties have been selected, the lead attorney’s name is displayed next to the specified party.

7. After completing the fields for all parties, click



Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the **Filing History** page. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope** to continue with your filing.

Entering Filing Details

The **Filings** section allows you to enter the filing details and calculate the fees associated with the filing.

Figure 1.4 – Filings Section

To enter the filing details, perform the following steps:

1. Enter the filing details for the case in the **Filings** section:
 - a. Select a filing type from the **Filing Type** drop-down list.
 - b. Select a filing code from the **Filing Code** drop-down list.

Note: After you select the filing code, the fee associated with the filing code is displayed.

Note: Depending on your system configuration, some filing codes cause the Due Date field to be enabled.

c. Type a description of the filing in the **Filing Description** field.

d. Type a reference number in the **Reference Number** field.

Note: A reference number is a customer-created number for internal purposes only. Most courts do not see or refer to the Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Filing Comments** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

h. Click the **Related Parties** field to select the parties from the drop-down list.

Note: The related parties feature is configured by Tyler and may not be available on your system.

i. Click the **Lead Document** field to select a lead document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

j. Type a name for the lead document in the **Description** field.

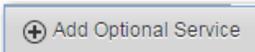
k. Click the **Security** drop-down list to select the level of security to attach to the document.

l. If you have attachments to load, click the **Attachments** field to select the documents to load. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

m. Click  to save your changes, or click  to cancel the action.

If you save your changes, the **Optional Services** section is displayed.

n. Click  to add an optional service to the lead document.

The **Optional Service** field is displayed.

o. Select a service from the **Optional Service** drop-down list.

Note: The fee associated with the optional service is displayed.

p. Type the number of services that you want, and then click .

The total quantity that you selected and the associated fees are displayed.

q. Add additional optional services if you want.

r. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

s. Click  to save your changes, or click  to cancel the action.

2. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

a. Select the payment account from the **Payment Account** drop-down list.

Note: If you enter incorrect payment information in the **Payment Account** field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

c. Select the filer type from the **Filer Type** drop-down list.

d. Click  to save your changes, or click  to cancel the action.

3. In the **Submission Agreements** section, select the check box for the appropriate submission agreement.

Note: Submission agreements are configured by Tyler and may not be available on your system.

4. After completing the fields in all of the sections on the page, perform one of the following actions:

- Click  to stop working on your filing and resume work at a later time. **Note:** To resume filing a saved draft, navigate to the *Filing History* page. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope** to continue with your filing.

- Click  to review a summary of your filing.

5. If you clicked , review the filing for accuracy. If you need to make any changes, click



to return to the previous page. Make any

necessary corrections, and then click 

6. When you are satisfied with the information in your filing, click .

A new **Envelope** of your filing is included on the *Filing History* page.

Filing Into an Existing Case

Once a new case has been created by the courts, you can file into the existing case.

To file into an existing case, perform the following steps:

1. Select one of the following methods to begin your filing:

- Click **File into Existing Case** from the *Filer Dashboard* page.

Note: The *File Into Existing Case* page is displayed. Select the county or district location from the **Location** drop-down list, and then select the specific court from the **Refine Location** drop-down list. (The choices in the **Refine Location** field are based on the court that you previously selected. Also, the location filtering feature is configured by Tyler and may not be available on your system.) Click the search option that you plan to use: **Case Number** or **Party Name**. Enter the search criteria, and then click **Search**.

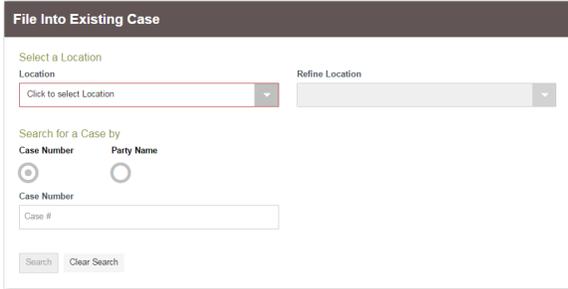


Figure 1.5 – File Into Existing Case Page

Note: When the correct case is displayed, select **File Into Case** from the **Actions** drop-down list for the specified case.

- Select **File Into Existing Case** from the **Actions** drop-down list. **Note:** The *File Into Existing Case* page is displayed. Click **Search** to locate the case that you want. When the correct case is displayed, select **File Into Case** from the **Actions** drop-down list for the specified case.
- From the *Filing History* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case**.

The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

When more than 100 parties are on a case, only the first party of each required type is displayed, along with a message that additional parties could not be displayed due to system constraints. Add additional parties to the case if you want.

2. Complete the filing details in the **Filings** section.
3. Complete the fields in the **Fees** section.
4. After completing the fields in all of the sections on the page, perform one of the following actions:
 - Click **Save as Draft** to stop working on your filing and resume work at a later time. **Note:** To resume filing a saved draft, navigate to the *Filing History* page. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope** to continue with your filing.

- Click **Summary** to review a summary of your filing.

5. If you clicked **Summary**, review the filing for accuracy. If you need to make any changes, click **Back** to return to the previous page. Make any

necessary corrections, and then click **Summary** again.

6. When you are satisfied with the information in your filing, click **Submit**.

A new **Envelope** of your filing is included on the *Filing History* page.